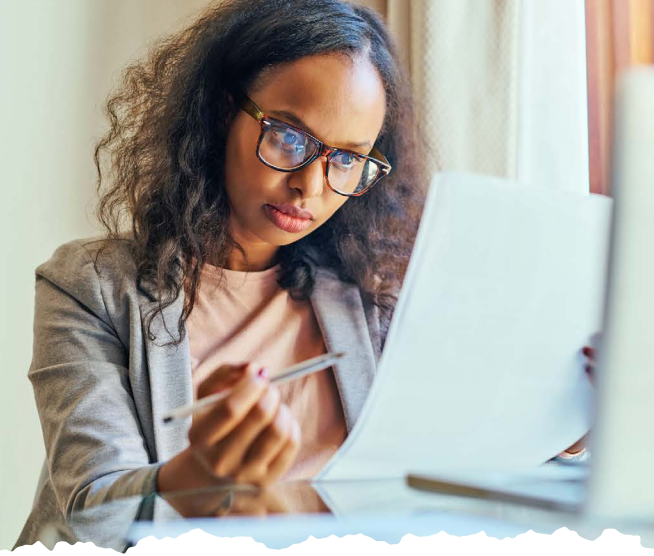


MULTIPLE WAYS TO COMPLETE MUTUAL INCOME SOLUTIONS APPLICATIONS



Mutual of Omaha offers the ability to submit the Mutual Income Solutions application via Paper Part A, full paper or e-application. This guide provides helpful tips to ensure a smooth process.

Completing Paper Applications

1. Where to find the paper app (Part A or full paper)

- You can download the state-specific Paper Part A or full paper application on Sales Professional Access (SPA).

2. Complete the paper application, whether it's Part A or full paper and applicable forms with your clients

- Please complete the application in its entirety. If you leave any items blank, it could cause unnecessary, and potentially significant, delays in processing the application.



*Failure to complete any of the following required fields correctly will render the application invalid and **you will be required to resubmit the application and applicable forms with the correct information.***

- Insured First Name
- Insured Last Name
- Gender at Birth
- Date of Birth
- Primary Residence Address (Number, Street, City, State, Zip)
- Social Security Number
- Customer Email
- Product Type
- Monthly Base Benefit Amount
- Customer Signature Name
- Customer Printed Name
- Producer Signature Name
- Producer Printed Name

3. How to submit the paper app

- Submit the fully completed application and applicable forms. Unanswered questions or missing or incomplete forms will result in underwriting delays
- The application and appropriate forms can be sent via scan and email, fax or mail.
 - **Scan and email**
 - Scan and email to:
InputAccel.HealthAppImport@mutualofomaha.com
 - Verify the correct email to protect the privacy of the information
 - **Fax**
 - Fax to: (402) 997-1804
 - Verify the correct facsimile number is dialed to protect the privacy of the information
 - Please note: use the maximum resolution to ensure readability
 - **Mail**
 - Mail to:
Mutual of Omaha Insurance Company
Mail Processing Center
3300 Mutual of Omaha Plaza
Omaha, NE 68175

If you choose to complete Paper Part A, here are the next steps after submission

- Your client has two convenient ways to complete the Part B Electronic Application:
 - Client completes Part B medical information online at their own convenience
 - Part B will be emailed to the applicant for completion via Secure Message Portal (SMP)
 - Client completes Part B medical information via a telephone interview
 - Client will need to call the Tele-App team at (800) 749-8652
 - Upon completion, the completed e-App is emailed to the applicant for signature via Secure Message Portal (SMP)
- Once your client completes Part B electronically, signs and clicks 'Submit' the application will be sent to Mutual of Omaha

Completing the E-Application

1. Where to find the e-application

- You can find the e-application on mutualincomesolutions.com

2. Completing the e-application

- Steps on how to complete the e-application along with options to complete the Part B can be found in our [Quote, E-App and Dashboard guide](#).

How to Monitor Your Applications

Go to the Live Dashboard located on mutualincomesolutions.com. To find an application, enter one or more search filter(s) at the top of the Dashboard. You can search by First Name, Last Name, Application Status or any combination of the three.

We're here to help

Producer/Agent Support

(800) 847-9785

Monday - Friday: 7 a.m. to 5:30 p.m. CT

Client Interview - Tele-App Team

(800) 749-8652

Monday - Thursday: 8 a.m. to 8 p.m. CT

Friday: 8 a.m. to 5 p.m. CT

Saturday: 10 a.m. to 2 p.m. CT